stryker

SurgiCount URT user guide

SurgiCount
Safety-Sponge System

Table of Contents

Getting started:
## Go to https://urt.stryker.com and login.

If you experience difficulties, contact Stryker. For additional information, including safety information, in-service training, or current literature, contact a Stryker Sales Representative or call the Stryker Customer Experience Center at 1-877-520-2300 or by going online to the SurgiCount Customer Resources website **http://strykersurgicount.com/resources/customer-tools/**
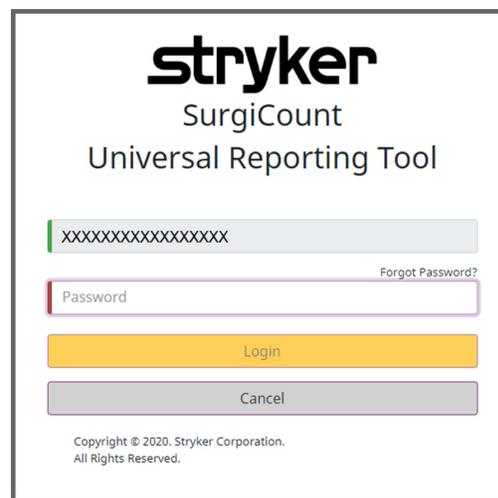
When your account is set up during implementation you will receive a "Welcome to SurgiCount" email providing your user name and a temporary password. You will be required to change your password upon initial sign on. Please note when a user enters a username the system will verifiy that it's a valid username in the URT system

If you forget your password, click on 'Forgot Password.' A new email will be sent to you with instructions for changing your password.

Symbols

Icon/Button	Description
✚	Add
✖	Close Report
🕓	Schedule Report
⬇	Download Report
🗑	Delete
🔍	Quick Search
🔒	Locked (Administrator Only)
🔓	Unlocked (Administrator Only)
◖	Toggle Switch
⏮	First
⏭	Last
‹	Previous
›	Next
⌂	Dashboard
▤	Cases
📈	Reports
🕐	My Reports
🔭	Advanced Search
🔔	My Notifications
👥	Accounts (Administrator Only)
📱	Devices (Administrator Only)
R	Case – Reviewed
🚫	Case – Quarantined

Dashboard

From the Dashboard screen users can customize the data presented by adding or removing reports. This can be adjusted to fit the users' needs and preferences. Users have the option to add generic reports, generic bar charts, or generic pie charts.

Users can navigate to different screens by clicking on the links provided on the left side of the interface or by clicking on the pie chart piece to go directly to the reports represented there.
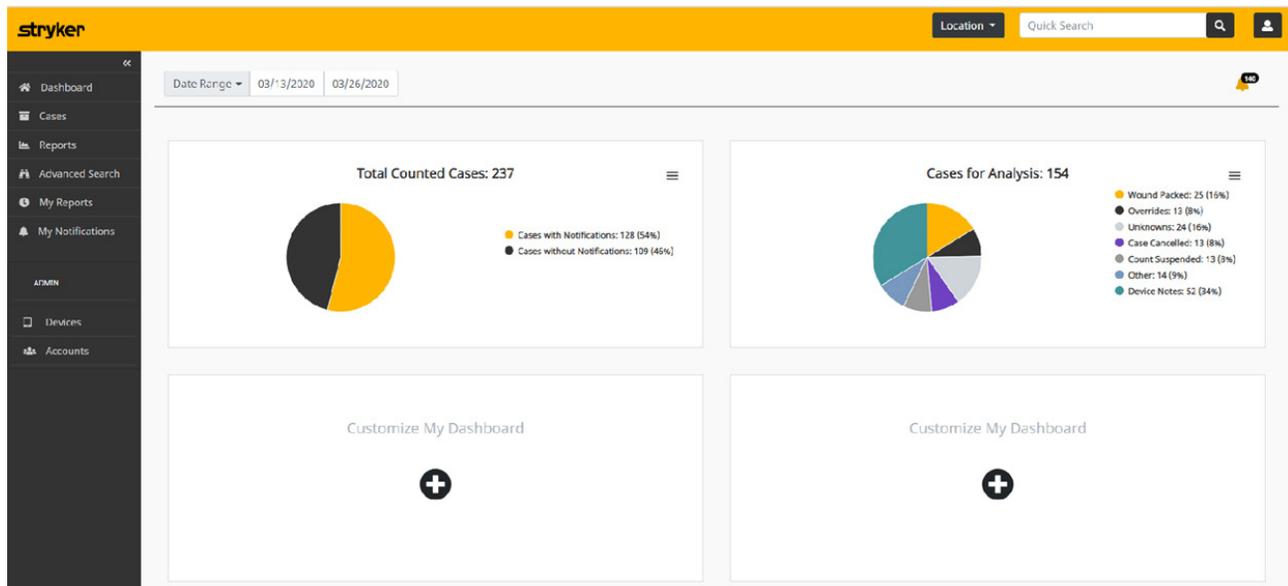
| No.	Feature	Function
1.	Location	The location field filters the data you will view and is defaulted to the location your account is set up to during implementation. You can select a location or locations (Hospital, Campus, Department) for the data you want to view.
2.	Quick Search	The Quick Search feature allows you to quickly locate specific case report data. The Quick Search features allows you to search by the following: Case Number, Patient ID, Staff Name or Staff Badge Number. To search additional data elements, use the Advanced Search Feature.

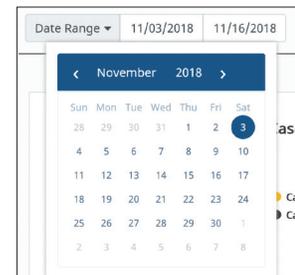|				
3.	**Profile**	The icon in the ⬛ upper right corner will allow you to review your user profile, access Help links and Logout. admin1@stryker.com User Profile Help Logout	User Profile displays your account information, role, and allows you to change your password. User Information Email: admin1@stryker.com Role: Admin Security Change Password ➡	Help - provides access to the User Guide, Email Support, Badge Requests, and About. User Manual Email Support Badge Request About
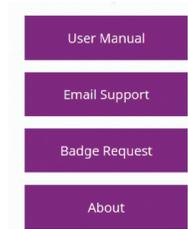
4.	**Date Range**	Date Range will filter the data you will see based on case report creation date and defaults with case reports created in the last 14 days. You can select specific date(s) using "Custom" which will allow you to set the beginning and end dates for your data selection.

Date Range ▼ 11/03/2018 11/16/2018

‹ November 2018 ›

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

5.	**Unreviewed Case Reports**	The 'Bell' 🔔716 icon will display the total number of unreviewed case reports from the last 365 days that need to be reviewed. Clicking on the icon will take you directly to the Unreviewed Cases Page.

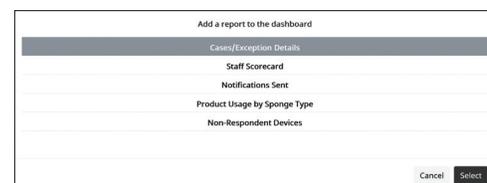|		
6.	**Total Counted Cases**	Total Counted Cases displays a graph of cases in two categories: • Cases without notifications • Cases with notifications You can print and download the desired graph by clicking on the ☰ icon in the upper right corner. Touch pie chart to see more details.

7.	**Cases for Analysis**	Cases for Analysis displays a graph of all cases that may require additional review and analysis. This includes cases with the following conditions: Wound Pack, Override, Unknowns, Case Cancelled, Count Suspended, Other and Device Notes. This graph can be printed by clicking on the ☰ icon in the upper right-hand corner. Touch pie chart to see more details. Note: The total number of cases for analysis does not necessarily match total cases with notifications.

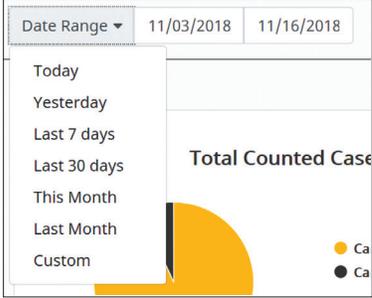|		
8.	**Customize My Dashboard**	You may personalize your dashboard by clicking on the ➕ icon. This gives you the ability to view your desired reports directly from the dashboard. These displays may also be printed and downloaded for external use. Add a report to the dashboard Cases/Exception Details Staff Scorecard Notifications Sent Product Usage by Sponge Type Non-Respondent Devices Cancel Select

Cases

From the Cases screen users can download and/or review data. The data is presented for the selected date range and is presorted by the date column (with the most recent case appearing at the top of the list). The column headers can be clicked to sort data as necessary, and data can be filtered by the location as well as date range and case type. Users can click the generated case identification number to access case details.

No.	Feature	Function
1.	**Date Range**	Date Range will filter the data you will see based on case report creation date and defaults with case reports created in the last 14 days. You can select specific date(s) using "Custom" which will allow you to set the begin and end dates for your data selection.
2.	**Case Type**	You can select the specific case type filters to be applied to the data based on the type of case reports that need to be reviewed. You can filter multiple case types by clicking the checkboxes on/off to determine your filter. Defaults to "All".
3.	**Case ID Hyperlinks**	Select a specific case to view the details of the selected case. If the case ID is followed with "Ⓡ", the case has already been reviewed.
4.	**Date**	Indicates the start date and time for the case report.
5.	**Case Details**	The column displays the report status.
		• Correct Count: Indicates that all items scanned in were scanned out properly with no additional reasons for review.
		• Exception: Indicates that although your case count is correct, there are additional items for review.
		• Requires Review: Requires immediate attention as there may be critical items for review.
		• Open: Indicates that data for the case is still pending.
		• Locked: Indicates a case that is locked.
6.	**Close Reason**	Indicates how the case was closed and submitted by the circulator.
7.	**Patient Info**	The patient identifier associated with the case.
8.	**Opening/Closing Circulator**	Staff information provided when opening/closing a case.
9.	**Service**	The service type provided for the case report.
10.	**Notes**	Provides a link to all notes (case and post review) entered on the case report. The column will be blank if there are no notes included.
11.	**Location**	Displays the location associated with the tablet used for the case report.

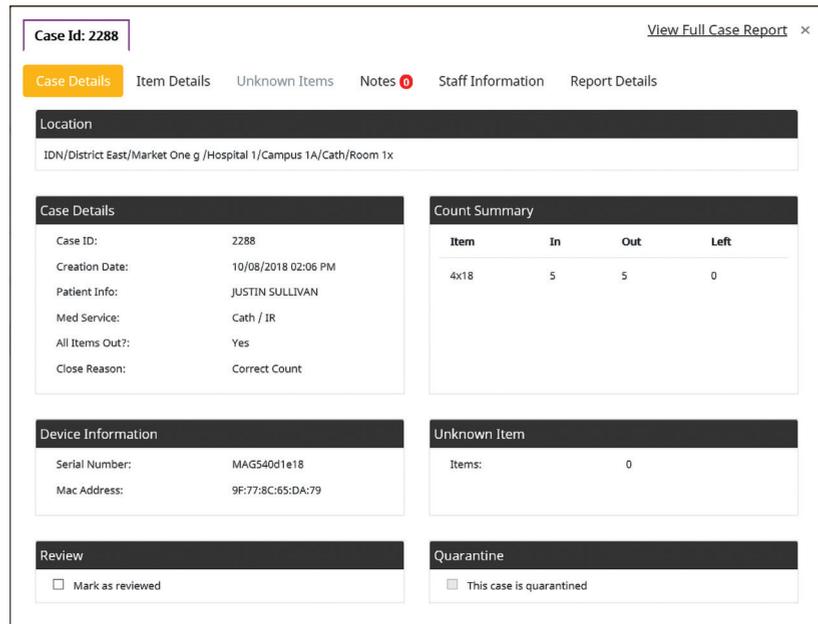# Viewing 'Case Details' for a specific case

A hyperlink associated with the case ID will take you to the Case Details for additional information related to the case report.

Case Id	Date	Case Details	Close Reason	Patient Info	Opening Circulator	Closing Circulator	Service	Notes	Location
2667	/01/2020 00:17 AM	Exception	Correct Count	DEBRA RIVERA	ARTHUR ADAMS	AMBER THOMAS	ENT	1	...us/Department/Room
1168	03/30/2020 03:10 PM	Correct Count	Correct Count	JULIA GUTIERREZ	ALICE WATSON	SEAN EDWARDS	Bariatric		...us/Department/Room
1167	03/30/2020 01:05 PM	Correct Count	Correct Count	EMILY JONES	JULIE HALL	ANTHONY EVANS	Transplant	1	...us/Department/Room

Case Details

The Case Details provides you with a summary level of case information.

No.	Feature	Function
1.	Location	Location of the tablet associated with the case.
2.	Case Details	General case info including the date and time the case opened, Patient Info, Service type, and close reason
3.	Device Info	Tablet serial number and Mac address
4.	Count Summary	Summary of the number of sponges scanned in/out during the case.
5.	Unknown Items	Summary, if any, of unknown items or sponges scanned during a case. Unknown Sponges scanned would generate a notification.
6.	Review - Mark as reviewed	After reviewing a case, clicking the check box will mark it as reviewed. This will remove the case from the "cases to be reviewed" filter. This will be indicated by the "Ⓡ" icon following the Case ID.
7.	Quarantine - This case is quarantined	Click the check box to quarantine training and test cases removing them from the total cases and statistical breakdowns. You can also unquarantine a case here by unchecking the check box.
8.	View Full Case Report	Selecting the link shall open the FullCase Report for the user to view.

Item Details

Item Details provides you a complete overview of the sponges used in a case. This tab displays the unique sponge ID's, sponge type, and times scanned into and out of the case. Disposition will include Scanned In, Scanned Out, or Wound Packed. Wound pack sponges can be tracked to the previous case from under the hyperlink provided. Any cases that reconciled wound packed sponges from a previous case will portray "1 case" underneath "Other cases."

Case Id: 2288 — View Full Case Report ✕

Case Details | Item Details | Unknown Items | Notes 0 | Staff Information | Report Details

Count Summary

Sponge ID	Type	Time In	Time Out	Disposition	Other Cases
N1bfd9	4x18	10/08/2018 02:06 PM	10/08/2018 02:06 PM	Scan Out	
Nda027	4x18	10/08/2018 02:06 PM	10/08/2018 02:06 PM	Scan Out	
Nc23ad	4x18	10/08/2018 02:06 PM	10/08/2018 02:07 PM	Scan Out	
N672da	4x18	10/08/2018 02:06 PM	10/08/2018 02:07 PM	Scan Out	
N2e6e2	4x18	10/08/2018 02:06 PM	10/08/2018 02:07 PM	Scan Out	

Unknown Items tab

Unknown Items displays any unknown items scanned throughout a case which does not follow a traditional count. An unknown scan is not a closing reason but may be a significant event for review. The tab provides the sponge ID, sponge type, and the time scanned out.

- Actual Unknown: Flagged when a circulator closes the report without reconciliation of unknown scanned items. These should ALWAYS be reviewed and monitored quickly due to the increased risk of having sponges unaccounted for.

- Process Related: Flagged when a circulator reconciles the sponge count properly before closing. These should be monitored periodically as an excessive amount of process related unknown cases could indicate additional training required.

Case Id: 2505 — View Full Case Report ✕

Case Details | Item Details | Unknown Items | Notes 1 | Staff Information | Report Details

Case Report - Unknown Item Details

Sponge ID	Type	Time Out	Unknown Type	Other Cases
~Surgeon9255	N/A	11/05/2018 08:19 PM	Actual	

Notes

Notes allows you to view and create notes. Notes are entered by a nurse during that specific case on the tablet or as a Post Case Note during a review.

Case Id: 2505 — View Full Case Report ✕

Case Details | Item Details | Unknown Items | Notes 1 | Staff Information | Report Details

Notes

11/05/2018 08:28 PM / Case note
Test

ADD A POST CASE NOTE

Staff Information

Staff Information displays the timestamped scan of the Opening Circulator, Closing Circulator, and any staff changes that are recorded during the case.

Reports Details

Report Details provides the raw data collection of all tablet transactions that occurred during a case.

Clicking on the 'View Full Case Report' tab provides a comprehensive overview of all the information specific to that case.

By clicking the arrowed icon in the top right corner, you can download individual case reports to PDF.

Reports

The Reports screen provides reports that can be reviewed, exported, scheduled to email and printed.

Case Reports

Cases/Exception Details

Provides you access to exceptions by service type and exceptions as a percentage of the total amount of cases completed.

Service ^	Total Cases	Exceptions	Overrides	Actual Unknown	Process Unknown	% Overrides	% Exceptions	% Actual Unknown	% Process Unknown
Bariatric	14	4	2	0	0	14	29	0	0
Cardiac	5	3	0	0	0	0	60	0	0
Cath / IR	9	2	0	1	0	0	22	11	0
Colorectal	7	3	1	1	0	14	43	14	0
ENT	13	4	1	0	0	8	31	0	0
General	10	4	0	0	0	0	40	0	0
GU	12	2	3	1	0	25	17	8	0
GYN	11	5	0	1	0	0	45	9	0
L&D / C-Section	3	0	1	0	0	33	0	0	0
L&D / Vaginal Delivery	40	9	2	1	11	5	23	3	28
MXfacial	9	3	1	0	0	11	33	0	0
Neuro	8	2	0	1	0	0	25	13	0
Ophthalmic	5	2	0	1	0	0	40	20	0
Oral	10	3	0	0	0	0	30	0	0
Ortho	8	2	0	0	0	0	25	0	0
Peds	10	4	0	0	0	0	40	0	0

Unreviewed Cases

Provides you access to view all cases which are in a status of 'Unreviewed.'

- **Unreviewed:** Cases with notification(s) that have yet to be reviewed.

Case Id	Date	Case Details	Close Reason	Patient Info ˅	Opening Circulator	Closing Circulator	Service	Notes	Location
1082	03/20/2020 05:24 PM	Requires Review	Correct Count	ZACHARY FOSTER	CYNTHIA BENNETT	DORIS COOPER	Podiatry		...us/Department/Room
975	03/20/2020 03:26 PM	Exception	Case Cancelled	WILLIE ALLEN	ELIZABETH HALL	ZACHARY JACKSON	Spine		...rtment/Mark's Room
1111	03/20/2020 07:43 PM	Locked	Case Locked	VIRGINIA YOUNG	MARILYN ORTIZ	SAMUEL RODRIGUEZ	Bariatric	1	...us/Department/Room
1057	03/20/2020 04:14 PM	Requires Review	Other Exceptions	VIRGINIA RICHARDSON	MEGAN HILL	TIMOTHY GOMEZ	GYN	1	...us/Department/Room
979	03/20/2020 03:28 PM	Exception	Correct Count	VICTORIA RODRIGUEZ	PAMELA HOWARD	JESSE BROOKS	L&D / Vaginal Delivery	1	...rtment/Mark's Room
873	03/19/2020 10:54 AM	Exception	Case Cancelled	TIFFANY TORRES	EMILY DIAZ	GARY REYES	Peds		...us/Department/Room
891	03/19/2020 11:03 AM	Exception	Correct Count	TIFFANY HOWARD	JUSTIN STEWART	JEAN PRICE	L&D / Vaginal Delivery		...us/Department/Room
1064	03/20/2020 04:18 PM	Exception	Count Suspended	THERESA PERRY	HEATHER PERRY	MARY LEWIS	Oral		...us/Department/Room
884	03/19/2020 10:59 AM	Requires Review	Correct Count	TERRY PERRY	JANET BAKER	VIRGINIA BENNETT	Spine		...us/Department/Room
1118	03/24/2020 09:54 AM	Exception	Correct Count	STEVEN JOHNSON	ASHLEY CRUZ	ADAM JOHNSON	Transplant	1	...rtment/Mark's Room
1138	03/24/2020 11:36 AM	Requires Review	Correct Count	STEPHANIE BARNES	CHRISTINA BROWN	CHRISTINE EVANS	GU		...us/Department/Room
881	03/19/2020 10:58 AM	Exception	Count Suspended	SHIRLEY ALLEN	DIANA CARTER	JEFFREY GONZALEZ	MXfacial		...us/Department/Room

Quarantined

Provides you access to view all cases which are in a status of 'Quarantined.'

- **Quarantined:** Feature to remove training and test cases from overall data/hospital's case statistics.

Staff Reports

Staff Scorecard

This enables you to view the performance of the staff, both as a whole and individually, with regards to the use of the SurgiCount system.

No.	Feature	Function
1	**Staff**	Allows you to filter 'Staff Summary Scorecard' by either the entire staff or a specific individual.
2	**Staff Scorecard Summary**	Provides a statistical breakdown of any case exceptions in the previous 90-days.
3	**Most Case exceptions**	Lists the ten staff members that have had the most case exceptions. Each name has a hyperlink which brings you to their individual scorecard.

Notifications

Notifications Sent
Enables you to view specific cases that triggered an email notification. All the data from these specific cases are present within this tab.

Product Reports

Product Usage

Provides you the ability to view the total, type, and pack quantities for sponge usage within the facility. This can be filtered by date range, service, and sponge type.
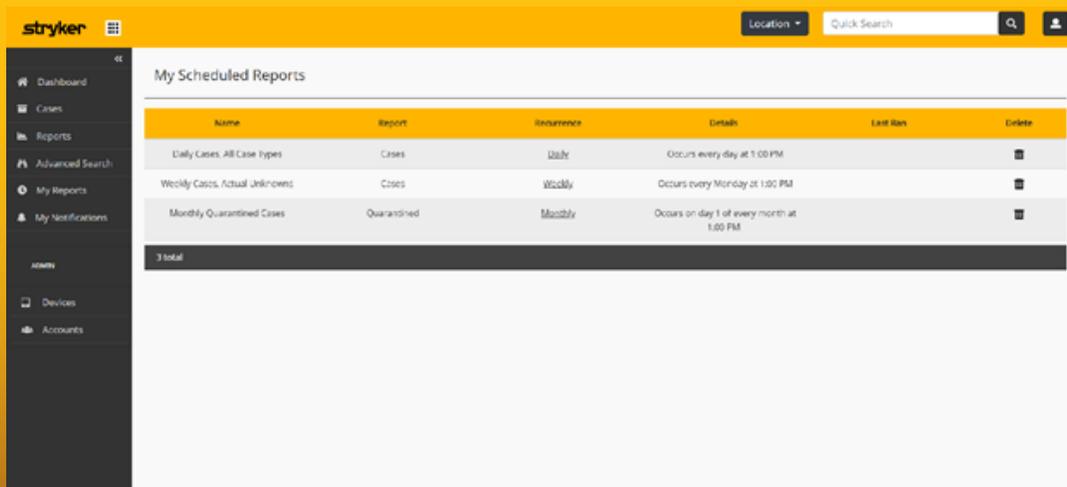

Non-Respondent Devices

Provides you access to view non-respondent devices providing the opportunity to troubleshoot if necessary.

My Reports

The My Reports Screen provides the user with a list of all recurring scheduled reports which have been set up by the user to be delivered to the user's email inbox.

No.	Feature	Function
1.	**Name**	Displays the custom name for the report created by the user.
2.	**Report**	Indicates the type of report which has been scheduled by the user.
3.	**Recurrence**	Indicates the specific recurrence which has been selected by the user. Options are: Daily, Weekly, and Monthly. The user can select the link in order to edit the desired recurrence. • Daily – Runs daily and delivers data for the prior day. • Weekly – Runs when specified by the user and delivers data for the prior week (Sunday through Saturday). • Monthly – Runs when specified by the user and delivers data for the prior month (1st through the last day of the month).
4.	**Details**	Indicates exactly how often the user shall receive the report.
5.	**Last Ran**	Indicates the last time that the report was ran and delivered to the user. Blank if the report has not been ran yet.
6.	**Delete**	Selection shall delete the scheduled report.

Scheduling Report Details

The user can select to create a scheduled recurring report on the following pages/reports:

- Cases – Report attached to email as a .CSV file

- Cases/Exception Details – Report attached to email as a .CSV file

- Unreviewed Cases – Report attached to email as a .CSV file

- Quarantined – Report attached to email as a .CSV file

- Staff Scorecard – Report embedded in the email

- Product Usage – Report embedded in the email

Schedule Report

Cases

Parameters :
  Case Type(s) : All

Recurrence :
  ● Daily   ○ Weekly   ○ Monthly

    Daily reports contain prior day's data delivered at the preferred time designated.

Preferred Time : 01 : 00 PM

☑ Hide Patient Information on Sent Report

Name : [Unique report name]
  Name is required

Cancel   Save

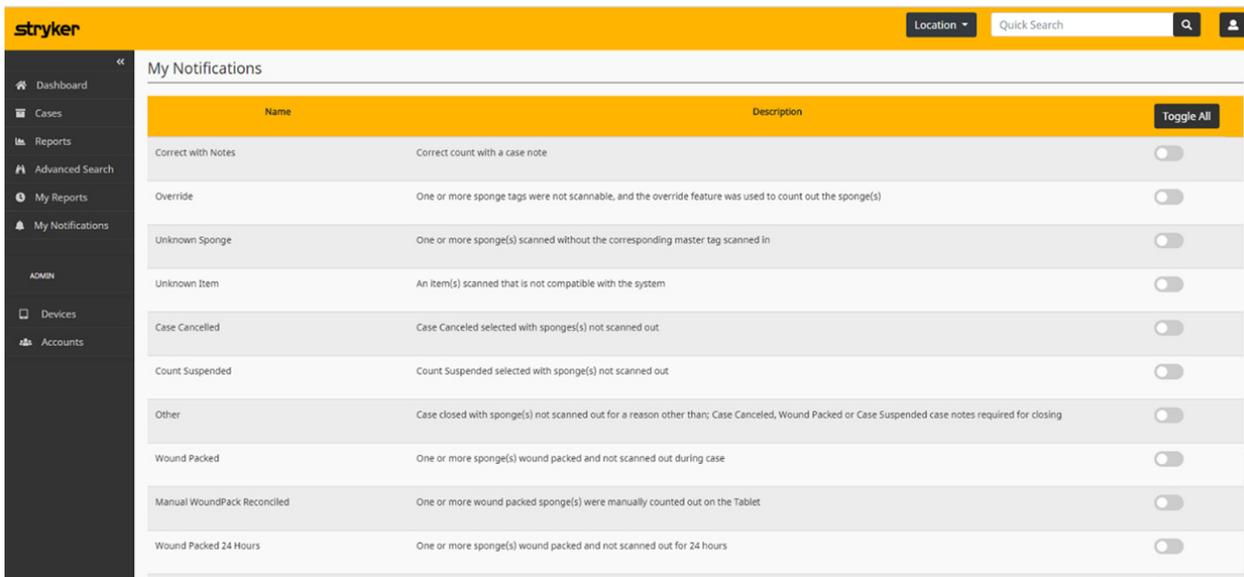| No.	Feature	Function
1.	**Report**	Indicates the name of the report which is being scheduled by the user.
2.	**Parameters**	Indicates the specific parameters which have been selected by the user. This is pulled from whatever has been selected by the user on the page itself prior to selecting the button to schedule a recurring report. Note: not present for all report types.
3.	**Recurrence**	Allows the user to select Daily, Weekly, or Monthly recurrence options, as well as providing the ability to select a preferred time for the report to be generated. The default recurrence is 'Daily'.
4.	**Hide Patient Information on Sent Report**	When checked, hides the patient information on the delivered report. Checked by default. Note: not present for all report types.
5.	**Name**	Allows the user to create a customer name for the report. Note: Must be unique from other scheduled reports
6.	**Cancel/Save**	Selecting Cancel shall close the popup box and not create or edit the report. Selecting Save shall close the popup box and create or edit the report. Created reports shall display on the My Reports page on the grid. Delivered reports shall include the desired report (either as an attached .CSV file or embedded in the email itself) and contain the following information: • Report Type • Location(s) • Selected Parameters – If applicable • Date Range • Patient Information – If applicable

Advanced search

Advanced Search allows you to search the entire database based on advanced search criteria. The data can be filtered by Patient Information, Staff Information, Stryker Tablet Serial Number, Service Type, Specific Sponge Code, and Specific Case ID.

My notifications

My notifications allows you to toggle which notifications you would like to receive via email. Toggling which notifications are sent via email is indicated by the color green (on) or gray (off).
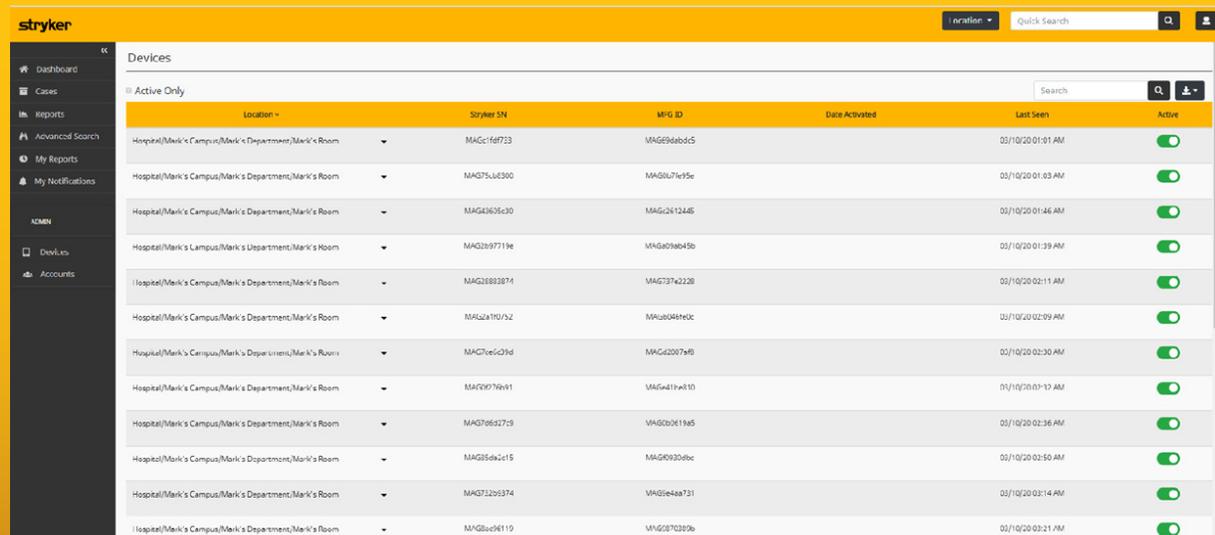
Administrators section

Devices

Administrators can view all the devices associated with their account. When "Active Only" is selected, only currently active tablets at the account will be displayed on this page.

No.	Feature	Function
1	**Location**	Provides users the assigned location of the specific tablet.
2	**Search Bar**	Users can quickly search for a tablet via this tool bar.
3	**Active**	Admins can deactivate a tablet here if it needs to come out of circulation.

Accounts

Administrators can view, add, and edit information associated with the SurgiCount URT accounts at their facility.

No.	Feature	Function
1	**Search**	Allows you to search for a specific account.
2	**Add Account***	Allows you to add additional accounts.
3	**Download Report**	Excel download of all the users at the hospital.
4	**Role**	Can be toggled between administrator and reviewer depending on staff members desired access.
5	**Notifications**	Will bring user to the notifications page associated with that account to toggle which notifications are sent via email.
6	**Delete Account**	Allows admins to remove access for specific accounts.

*Add Account

Screen that allows the administrator to add additional accounts and define the role of the users.

Optional Features

Two Factor Authentication Access

Two Factor Authentication (TFA) is a separate application that handles a user's ability to use one login and password in order to access various Stryker applications. For users who are configured for TFA: accessing URT for the first time will be a different experience. The delivered invitation email will not have a temporary password associated with it.

Navigating to the link will present the user with the same login screen as before to URT. However, when the user submits their email address for the first time, the user shall be presented with a screen asking for a valid mobile number.

After the first time, subsequent logins will already note the entered phone number that the user provided and present the user with the following screen:

When the user has entered a phone number (first time login only) and selected to 'Send Code', the user shall receive a text message with a temporary code in it. The screen shall change to the following once the button has been selected.

After the user enters their code, they'll be logged into URT. TFA is using the user's Single Sign-on based upon what they entered.

Note: all functionality on URT shall be unchanged from this point forward with the exception that the user shall not be able to change their password on their profile. Password management shall be handled in TFA. A user enabled for TFA can also log in directly into Insight Center (the application handling TFA) and then navigate to URT directly from there.
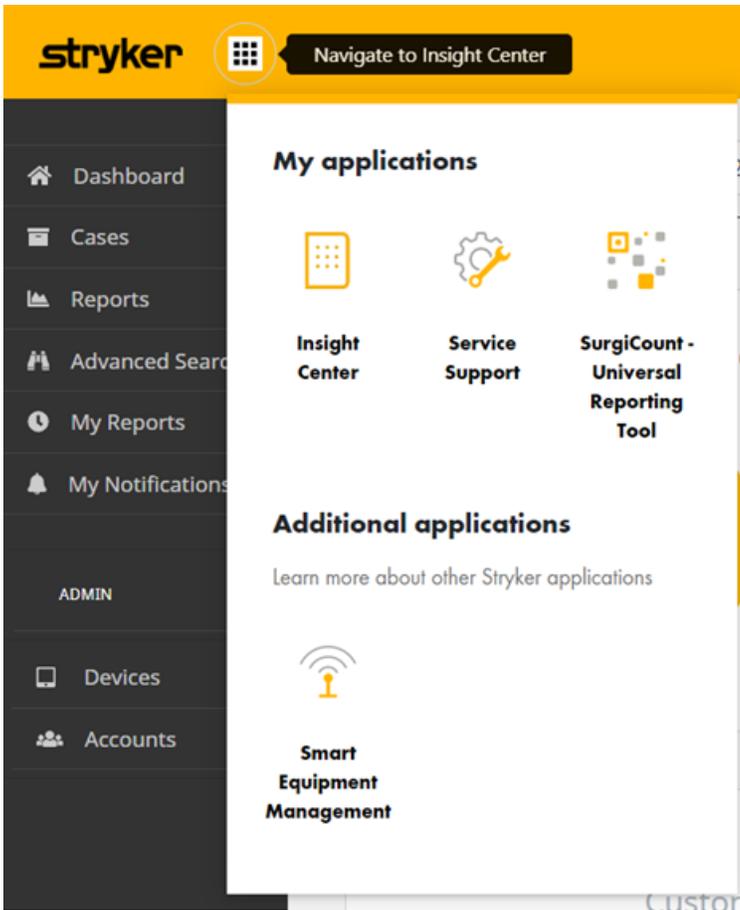
If the user has TFA enabled, the user shall have an icon next to the Stryker logo in the top left hand corner on most screens. Hovering your mouse over the icon will bring up hovertext stating 'Navigate to Insight Center'. If the user clicks on the icon, a popup shall open allowing the user to navigate to Insight Center, Service Support, or back to the SurgiCount Universal Reporting Tool.

EMR Integration

EMR integration is an optional feature that can be enabled at the customer level. When it's enabled, customers will be able to directly send case information to their internal EMR systems. If transmissions fail, then users will also be able to manually match those cases to open cases on the customer side so that those cases can be successfully reconciled for the customer.

Customers with EMR enabled will see several changes on URT.

New report available: 'EMR Failed'

- Provides you access to view all cases which are in a status of 'EMR Failed''
- Note: this report can also be set up as a recurring scheduled report.
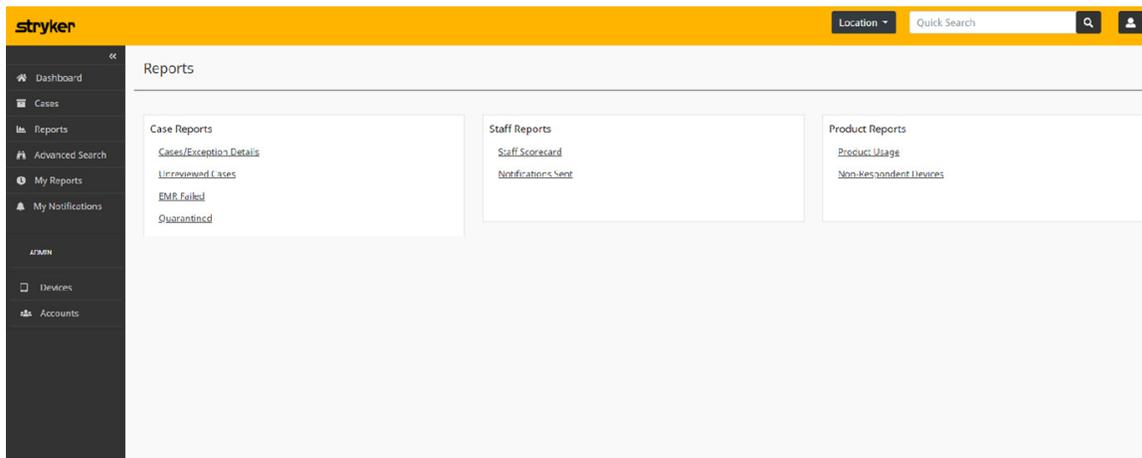
New column available: 'EMR'

- Applicable Pages/Reports:

  Cases

  Unreviewed Cases

  EMR Failed

  Quarantined

  Quick Search Results

  Advanced Search Results

- The column displays the EMR status.

  Success (green): Indicates that the case correctly matched a case in the customer's EMR system and the data for the case was successfully transmitted.

  Pending (black): Indicates that the case has not resolved yet. If multiple cases are pending, there may be a communication issue with the customer's EMR system. Contact Tech Support.

  Failed (red): Indicates that the case did not successfully match a case in the customer's EMR system. The user will need to manually match the case in order to reconcile the issue.

New filter available: 'EMR Failed'

- Applicable Pages/Reports:

    Cases

- The filter, when enabled, shall only display those cases where the status in the EMR column is Failed.

New notification available: EMR Failed – Patient ID Mismatch

- The notification, when enabled, will send the user an email notifying them of a patient ID mismatch.

New section available on Case Details: 'EMR'

• This section shows the EMR Status of the Case being viewed. Options are:

Success (green): Indicates that the case correctly matched a case in the customer's EMR system and the data for the case was successfully transmitted.'

Pending (black): Indicates that the case not resolved yet. If multiple cases are pending, there may be a communication issue with the customer's EMR system. Contact Tech Support.'

Failed (red): Indicates that the case did not successfully match a case in the customer's EMR system. This is typically due to a patient ID mismatch between what was entered on the tablet and what is entered in the customer's EMR system for the patient. The user will need to manually match the case in order to reconcile the issue.

> When the selection is 'Failed', there shall be a link that will enable the user to manually correct the transmission of the case to the customer's EMR system. This link is only available to Admin users.

New screen: Patient ID Correction.

- The user gets to this screen my selecting the 'Failed' link on the Case Details screen. Note that only users with the Administrator role shall be able to make these corrections.

- This screen shows possible matches drawn from the customer's EMR system, displaying open cases on the customer's side that are available for matching.

No.	Feature	Function
1	Date Picker	Indicates the date in the customer's EMR system being queried. Defaults to the date of the procedure. The user can enter a date directly or use the buttons to navigate the dates. The user can only go 30 days into the past.
2	Current Case Information	Indicates, for reference, the Patient ID and the Case Creation Date of the failing case being matched.
3	Service Information	Indicates, for that row, the date and time of the procedure being matched.
4	Patient ID	Indicates, for that row, the Patient ID from the customer's EMR system for the procedure being matched
5	Visit ID	Indicates, for that row, the internal Visit ID from the customer's EMR system for the procedure being matched.
6	Service Type	Indicates, for that row, the service that was done for the procedure being matched.
7	EMR	Indicates, for that row, the EMR status for the procedure being matched. Only Failed procedures can be matched so only Failed procedures are shown.
8	Location	Indicates, for that row and if known, the location for the procedure being matched.
9	Select Button	Selection shall highlight the selected row and enable the 'Next' button.

Matching Screen

When the user selects the 'Next' button, the user shall be presented with a confirmation screen. The user selects the 'Submit' button to confirm the match. When done, the match is completed and the case data is sent to the customer's EMR system. The Case Details Page shall update to show that the transmission status is now a success and also present the original and matched information to the user.

Success after Matching

Included in Patient Information Section:

• This section shows the EMR Status of the Case being viewed. Options are:

  Success (green): Indicates that the case correctly matched a case in the customer's EMR system and the data for the case was successfully transmitted.

  Pending (black): Indicates that the case has not resolved yet. If multiple cases are pending, there may be a communication issue with the customer's EMR system. Contact Tech Support.

  Failed (red): Indicates that the case did not successfully match a case in the customer's EMR system. The user will need to manually match the case in order to reconcile the issue.

• If the user has manually corrected the transmission so that it has gone from 'Failure' to 'Success', then information surrounding the original Patient ID and the date of the transmission correction are displayed to the user.

Full Case Reports

Initial Success

Initial Failure

Corrected Success

Additional EMR Updates:

- If a Failed transmission has been updated to Success, then the new/updated patient ID shall display on the Cases Page and all reports in the Patient ID column.

- If a Failed transmission has been updated to Success, then the user can search on both the old and the new patient ID on the Advanced Search screen (using the 'Patient Information' field) and return the same results.

Terms and definitions

Case report and data available

Location: Recorded location of tablet used

Case ID: Internal number generated when report is received

Date/Time: Date/time related to each activity on the tablet (e.g., data entered, scanning, notes, etc.)

Patient Information: Patient ID entered on tablet (e.g., MRUN, VisitID, Account #, etc.)

Medical Service: Service selected on table

Close Reason: Correct Count, Wound Packed, Case Cancelled, Count Suspended, Other, Discarded, Non-Counting

Staff Information: Staff ID's entered on tablet (e.g., Badge ID, Name)

Device Information: Tablet serial #

Notes: Unstructured notes entered on tablet during case or post case review

Sponge Count Data: IN, OUT, Unknown, Override, Wound Pack

Report views & filters

Filters: Filters give the ability to limit the data provided in reports and views. Filters will appear at the top of the view or dashboard and provide a drop-down selection list.

- **Date Range:** Select the date range for the data you want to see in your views or reports. Defaults to last 14 days unless modified.

- **Location:** Select location (Hospital, Campus, Department) for the data you want to see in your views. Defaults with all locations based on your user account.

- **Service:** Select/limit the services you want to see in your views or reports. Defaults with "ALL"

Views: A view is what appears on the screen. Selecting a view will display only the data or reports related to that view. For example, if you want to only review your reports with unknowns select "With Unknowns" under the Case tab. If you want to see all types of your reports, select "All Types".

Correct count

Correct Count is a closing reason automatically recorded when all the sponges that were entered by scanning the master tags have been reconciled prior to closing the case. Reconciliation can be accomplished by scanning out the individual sponges or performing an override. A correct count report normally indicates everything is good and additional follow up is not required, but there are outliers that may require review (e.g., override, unknown or case notes entered on tablet). Note: Correct count cases do not normally require monitoring unless they include overrides, unknowns or case notes.

Correct count with case note

Correct Count with a case note is not a closing reason. It indicates that the circulator took the time to include a case note during the procedure. Note: The notes entered on all correct reports should be reviewed to determine what the circulator was communicating to management.

Override

Override is not a closing reason. Something happened during the procedure related to the count process. An override reflects that one or more of the sponges were manually overridden vs. being scanned out. Overrides should always be related to some type of condition (e.g., staining, damage, etc.) of the sponge barcode label that made it un-scannable. When the circulator does an override, they are documenting that they have the sponge in hand, out of the patient and a visual reconciliation with the sponge count on the screen has been completed. A note is required at closing documenting the reason for the override and a notification is sent. An override may apply to any report regardless of closing reason. Note: Overrides should be monitored periodically. An excessive number of overrides may indicate it is being used as a workaround for not properly scanning out the individual sponges before closing.

Unknown

Unknown is not a closing reason. Something happened during the procedure related to the count process. If the circulator attempts to be scan out an individual sponge that was not previously scanned in from a master tag, the tablet will have an audible/visible warning "UNKNOWN". This does not follow the standard process recommended of SCAN/BREAK/ COUNT at the time sponges are brought into the case and recorded for use. The tablet warning is intended to alert the circulator during the procedure that there is a problem and allow them to reconcile the count before closing. The circulator must go back to the Scan IN function, scan in the missing master tag and then return to the Scan OUT function and re-Scan Out the individual sponges. This will still trigger an unknown notification. If the circulator reconciles the sponge count properly before closing it is defined as a "Process" unknown. If the circulator closes the report without reconciliation it is defined as an "Actual" unknown. Both indicate that the application is not being used 100% properly. An actual unknown is extremely critical as it leaves sponges unaccounted for.

- **Actual:** Actual Unknown should ALWAYS be reviewed and monitored quickly due to the increase risk of having sponges unaccounted for.

- **Process Related:** Process Related Unknown should be monitored periodically. An excessive amount of process related unknown cases could indicate additional training required.

Closing reasons - exceptions

A closing reason is required for all reports. If the reason for closing is anything other than Correct Count the circulator must select the appropriate reason when closing the case. Any reason other than Correct Count is considered an exception and may require additional review.

- **Wound Pack:** Wound Pack is a closing reason, selected if one or more sponges are intentionally left in the patient for packing; no additional notes are required. When the case is closed, a notification is sent. The sponges are then kept in the wound pack table and reflected/ included in any subsequent cases for the same Patient ID. Notifications include: when packed, when reconciled (scanning or manual) and if not reconciled within 24 hours with a final notice if not reconciled within 90 days. Note: Wound Pack's should be monitored periodically to ensure proper use.

- **Case Cancelled:** Case Cancelled is a closing reason. You can select this closing reason and no additional notes are required. When the case is closed a notification is sent.

- **Count Suspended:** Count Suspended is a closing reason. You can select this closing reason and no additional notes are required. When the case is closed a notification is sent.

- **Other:** Other is a closing reason. Other is selected if all sponges are not scanned out for reasons other than the standard responses of Wound Pack, Case Canceled or Count Suspended. Unlike the other closing reasons, "Other" requires the circulator to manually enter a reason as to why all sponges were not scanned out during the case and a notification is sent. Note: Cases closed as "Other" should ALWAYS be reviewed to determine why "other" was selected as the closing reason and if the SurgiCount application was being used properly.

Non-counting cases

A Non-Counting case indicates that the user entered the following: circulator, patient ID and service information and proceeded as far as the scan IN screen on the tablet. Once you have initiated scan IN on the tablet, you are required to properly close the case. If nothing is scanned in, it is marked and filed as "Non-Counting". Note: Non-Counting Case reports should be reviewed periodically. Extensive Non-Counting case closed reasons could indicate the SurgiCount application is not being used properly.

Discarded cases

A Discarded case report indicates that the user did not go further in the sponge counting process than the "Service" prompt before trying to go back "Home" on the tablet. There may have been some information entered on the tablet, but they did not get to the SCAN IN screen on the tablet. The tablet will ask if they wish to discard the case if they respond by clicking "OK", the case is filed as discarded. Note: Discarded case reports should be reviewed periodically. Extensive Discarded case close reasons could indicate the SurgiCount application is not being used properly.

Pending cases

If there is a lapse in time between transactions for more than 8 hours, a notification will be sent (if subscribed to) alerting the user that a tablet is not communicating with the backend database. This may be due to user process or connectivity. Follow-up with the physical tablet is required to determine the cause. If the tablet is re-connected to Wi-Fi or the report is completed the remaining transaction will be sent to the backend database for processing. After 8 hours of no transactions being received from the tablet for an open case report, the report will be classified and filed as "Open (Pending)". The report and status will be viewable from the SC360/URT case report listings. Any subsequent transactions received from the tablet for that case report will then be processed, the case report updated and completed properly when all transactions required are received and processed. The report will then go from an Open (Pending) status to its appropriate closing status and display properly in the case report views and it will be properly included in any statistical compilations.

Locked cases

If a report remains in an Open (pending) status for more than 14 days, the report will be changed to Pending (Locked). At this time any remaining transactions received will be kept but not applied to the report for closing and it will remain in a Pending (Locked) status. This is based on the assumptions that a valid tablet/case report should not remain open for more than 14 days without some communication with the database. The user may see reports move from an Open (Pending) status to its appropriate closing status when additional information/transactions are received and processed. The Open (Pending) status should now be a temporary classification until all information is received and processed.

Quarantined cases

The ability to quarantine cases is provided to enable the user to have training and in service, create reports and keep them from skewing statistics. Quarantined cases are not included in statistical calculations or available in the standard filtered views. Once a report has been downloaded to the database in the Cloud, it cannot be deleted or edited, it can only be quarantined to remove it from the standard population. Note: Quarantined reports should be monitored periodically. An excessive amount of quarantined reports could indicate the statistics are being manipulated by removing valid reports. All quarantined reports include an audit trail indicating when the quarantine was done and by whom.

Surgical Technologies

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